



Community Economic Development Agency

STRATEGIC PLAN

For

ENTERPRISE CENTRAL NB



Prepared by P.K. Consulting

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EXECUTIVE SUMMARY

This report presents a strategy to guide the development of the Central NB regional economy over the next four years. The Strategic Plan is the product of hundreds of hours of work by dozens of Central NB residents who participated in a variety of workshops, interviews, sector task groups, survey questionnaires and committees.

Definition of the Strategy was preceded by an extensive economic analysis of the region's economy that is summarized in the section of the report entitled, "The Economy of Central NB". The analysis identified that the Central NB economy has experienced very positive growth in both population and economic performance indicators over the past decade (1991-2001). The challenge going forward will be to consolidate these gains and to build on them so as to sustain and, hopefully, increase future growth and development in keeping with projected goals and objectives.

The analysis indicates that Central NB has benefited from a strong and growing City of Fredericton economy and the future economic well being of the region will no doubt continue to be tied to that of the City. However, the analysis also indicates strong performance in the Central region in its own right and good prospects for continued growth in the future. To capture these opportunities and to maximize the region's growth potential will require an economic "game plan" that recognizes and builds on the region's strengths in a highly focused and proactive way. This paper proposes one such approach - a Strategy.

The Strategy proposes that Enterprise Central NB focus priority attention on growing its *economic base* and the companies that are part of that base. This, by definition, implies an emphasis on supporting companies to expand their exporting efforts; i.e. exports and exporting. It further proposes placing priority attention on the manufacturing or value-added companies that form that base, and proactively assisting those among them who are judged to have the most potential for growth and expansion.

In addition, the strategy recommends the pursuit of growth opportunities in certain other areas: primary processing of untapped and underutilized resources in wood and new initiatives in agriculture; development and expansion of the service sector, especially tourism and Knowledge Based Industries (including Customer Contact Centres and home-based businesses); supporting service-to-business and retail development appropriate for the region - to capture import substitution opportunities and to reduce "leakage" from the area.

The Strategy encourages Enterprise Central to recognize its interdependency with the City of Fredericton and action recommendations are proposed to help strengthen the relationship between the two regions and their economic development agencies so as to maximize development opportunities that will benefit the entire area.

As well, the strategy stresses the importance of collaborative action and the development of clustering strategies, especially in the wood and metal sub-sectors. It also emphasizes the importance of strategic alliances and networking, and the need to have Central NB become a much more "networked region" with respect to doing business and supporting business development.

It also speaks to the role of Enterprise Central, as a development agency, in proposing that EC focus on the priorities as outlined in the Strategic Plan and place particular emphasis on working proactively with businesses through the vehicle of sector groups, wherever and whenever possible, and providing a support network to these businesses, including a networked environment. As well, EC should continue with its one-on-one counseling to business and the promotion of entrepreneurship in the region. However, this should not come at the expense of focusing proactively and aggressively on strengthening the *economic base* of the region and directing priority attention at "high priority" companies and their sectors.

Finally, the Plan stresses the importance of EC providing the necessary economic leadership for which it is mandated. It underscores the importance of EC taking the necessary steps to ensure that it is unquestionably the single, most respected voice for economic development in the region. As well, the opportunity for the region to establish a positive "Central NB brand" was posed and a recommendation made to attend to its development, and the image of the region generally.

Community Economic Development does not operate in a (economic) vacuum, the study concludes. Social, educational, cultural, environmental, and health issues are also important and must be considered in the overall scheme of things – for *balanced development*. The analysis section of this report does identify a number of areas of social concern, especially training and education that will need attention and improvement in the interest of the overall well being of the region. This Strategy does not attempt to address these particular issues as they are outside the scope of this study.

In the interest of achieving results, the report stresses the importance of focusing on a few key areas. As the region moves forward to implement the strategy it will, undoubtedly face obstacles and challenges that will require renewed commitment and flexibility. When so challenged it will help to recall the words of Henry Ford: "Obstacles are those frightening things that you notice when you take your eyes off your goal."

INTRODUCTION

Enterprise Central (EC) was established in 2002 as one of fifteen Community Economic Development Agencies (CEDAs) in the Province of New Brunswick, with a mandate to foster community led economic development in the Central NB region. The principle role of EC is to provide leadership that will “give people and communities a more active role in shaping their economic future based on their region’s unique needs and advantages.” The CEDA framework is designed to “engage all three levels of government in a regional integrated approach to economic and human resource development.”¹ An important responsibility is for EC to involve all “partners” and stakeholders at the regional level.²

EC is to be the lead agency in fostering real and meaningful input from municipalities and community representatives across Central NB. As such, EC has a responsibility to ensure that the business community is fully engaged in the planning and development process. As well, EC is to encourage and coordinate community participation and government commitment in the planning process. A most important vehicle in providing for community input and participation is the Advisory Forum.³

As part of the Province’s “Prosperity Plan”, EC is committed to preparing a Strategic Plan to guide the region’s development over the next four years. The Plan is designed to ensure the region is positioned to maximize its full economic development potential so as to improve living standards for its residents. The plan is to be a “living” document that may be changed as circumstances and conditions warrant.

Developing a strategic plan for a region such as Central NB requires the input of all the key stakeholder groups that comprise the community. The Strategic Planning Committee is extremely thankful to the dozens of people who participated in the process and gave so generously of their time and energy. This is their Strategic Plan – a plan for and by the people of Central NB.

¹ *Greater Opportunity: New Brunswick’s Prosperity Plan (2002-2012)*, Section 15 - Community Economic Development Agencies.

² *Partners*: These are local and government agencies with and through whom EM must work to successfully plan and implement its strategic plan; e.g. BNB, RDC, TED, ACOA, and HRDC are considered full partners in the CEDA structure.

³ *Advisory Forum*: This is a body of (plus or minus) one hundred representatives from Central business and community organizations, MPs, MLAs, mayors, councillors and LSD presidents - a stakeholder group in the regional community)

THE STRATEGIC PLANNING PROCESS

For those who may not be familiar with this term, "strategic planning" is simply a disciplined effort to help organizations and communities determine their future direction and establish how they intend to realize their goals and aspirations. Strategic planning aims to work on the big canvas, to paint in broad strokes. An important part of the process is to explore what we are now, to affirm or renew our central mission as a development agency, and to develop a clear vision of how we see our region's future in the context of that Mission.

The process involves examining the opportunities and threats the region is facing as well as its internal strengths and weaknesses for meeting such challenges and exploiting opportunities. The plan presents a series of goals and objectives, and delineates strategies and an action plan, together with a timetable, for achieving these outcomes.

The EC Strategic Plan Process

ACTIVITY	REVIEW/DECISION/ACTION BY:	TARGET DATE
1. Planning Process	EC Board (tentative approval)	Jan/03
2. Economic Analysis	Planning Facilitator/SP Committee	Jan/Feb 03
3. Strategic Plan Orientation	EC Board Workshop	Jan 25/03
4. Strategic Plan Discussion Document	Planning Committee/consultant	Jan/03
5. Advisory Forum Consultation	Advisory Forum Workshop	Feb/03
6. Sector Strategy Development	Sector Task Groups (Advisory Forum, Board, partners and other industry sector members)	Feb-Apr/03
7. Community Leader Interviews	Business, political & opinion leaders	March /03
8. Draft Strategic Plan	Community Consultations (2) EC Board review	May/03
9. Review & Recommendations	Advisory Forum	May-Jun/03
10. Approve Strategic Plan (3 year)	EC Board	Jun/03
11. Implementation	EC & Partners	2003 -2006

Enterprise Central NB established a clearly defined process - outlined above - that was used to engage a broad cross-section of the regional community in the preparation of this Strategic Plan. The process commenced with the establishment of a Strategic Planning Committee from the EC Board of Directors whose responsibilities were to oversee and

manage the process and to report on progress to the Board. The Planning Committee engaged a consultant, P.K. Consulting, to help manage, facilitate and coordinate the process. A Working Group, consisting of the EC Executive Director, as chair, the Partners and the consultant, was established to carry out the preparatory work under the supervision of the EC Strategic Planning Committee (Appendix A)

The consultant commenced the process in January 2003 with a one-day workshop, involving the EC Board members and their Partners, as a first step to identifying strategic issues and regional and sector priorities. Next, the process was expanded to include the Advisory Forum and other community leaders. Their advice was solicited (in a half-day workshop in early February) to help refine the strategic issues, establish sector priorities and improve the strategic planning process itself.

Following the Advisory Forum workshop four economic sector Task Groups were formed to help identify sector specific business and investment opportunities. As well, they were asked to propose ways the region and its partners could work together to strengthen and improve these various priority sectors so as to produce jobs and income in the region over the next number of years. In addition, extensive interviews were conducted with over twenty-five businesses, political and community leaders to solicit their input to the process.

Following these consultations and an extensive economic analysis of the regional economy, a draft Strategic Plan was prepared and used to engage the broader community. Following community consultations in Salmon Creek (May 26) and Island View (May 27), a final draft Strategic Plan was prepared and presented to the Advisory Forum on June 5th for their advice and recommendations. Following this review, the Plan was revised and presented to the EC Board for final approval on June 19, 2003.

MISSION / VISION / OPERATING PRINCIPLES

1. Mission Statement

Our mission is to provide leadership in fostering economic growth and prosperity in Central NB.

2. Vision Statement

Central NB is a vibrant region with a solid and expanding base of companies exporting competitively into the United States and around the world. The region's population base is growing steadily as a result of an expanding young adult population who are attracted to the area due to the availability of good business opportunities, job and career prospects, and appealing life-style options. Central NB is a good place to live, work and raise a family given its close proximity to world-class educational, health, cultural and recreational programs and facilities.

3. Operating Principles

- We believe that effective working- relationships with our "partners"(BNB, ACOA, TED, CBDC, and our Municipal Councils) are crucial to realizing our region's development aspirations; EC will, therefore, fully cooperate with its partners using shared skills, honest communications, mutual trust, and respect.
- Enterprise Central is a regional (community) development agency; therefore, we will only take the lead on projects and initiatives that are regional in nature and promise to contribute to the regional economy as a whole.
- We believe that the best community development results will be achieved if staff are helped to focus on regional development priorities; therefore, the EC Executive Director should receive direction from the Board only through its Chairman on all policy, program and budgetary matters.
- We believe that the engine of economic development in a region is the "basic sector" of the economy; EC will, therefore, place primary emphasis on programs and activities that will serve to strengthen and enhance the region's economic base.
- We believe that BNB has lead responsibility for "seek & find"; EC will therefore work in close collaboration with BNB and ensure EC is prepared to entertain any investment opportunities that fit our region's profile and needs.
- We believe that the best prospects for growth come from within the region; therefore, Central NB will place priority emphasis on fostering development from within the community and support community initiated initiatives.
- We believe it is important that Enterprise Central understand the needs and aspirations of its constituents and be known throughout the region; therefore, ECNB will seek to communicate with and seek input from the community in an on-going manner, especially through the vehicle of the Advisory Forum.

The CENTRAL NB ECONOMY

The General Economic Situation

The EC Strategic Planning Committee undertook a comprehensive analysis of the region's economy, with the assistance of P.K. Consulting. The analysis included the following: a) economic data analysis; b) SWOT (strengths, weaknesses, opportunities and threat) analysis; c) sector analysis; d) strategic issues analysis; and e) assessment of the region's "economic base. This report only provides a very brief summary of the analysis and conclusions." (See Background Report for complete Situation Analysis).

The principle findings from this economic analysis are that Central NB has experienced positive growth in both population and economic growth indicators for the past decade (1991-2001). During this period, the Central NB region experienced a population growth of 4.1%. The bulk of this growth occurred in the first half of the decade (1991-96) - a full 3% gain - that slowed to a growth rate of .9% between 1996 and 2001.

Though much slower by comparison, EC is one of only five CEDAs in the Province to experience positive population growth during this period (ranked 3rd). In 2001, Central NB's population comprised 7.9% of the overall provincial population - a slight increase from its 7.7% share at the time of the 1996 Census. Most of the recent population growth is concentrated in census sub-divisions surrounding the Fredericton CEDA - in areas adjacent to the City of Fredericton - while declines tended to be in the outlying areas.

With respect to job performance, the regional labour force grew by an impressive 5.9% (29,510 to 31,245) between 1996 and 2001, placing Central NB among the top performing CEDA regions in the province. During this same period, the region's unemployment rate dropped by a full 4 percentage points (from 14.7% to 10.7%), compared to that of the province (-3%).

The economic analysis illustrates that the Central NB region has benefited considerably from a strong and growing City of Fredericton economy. However, the data also indicates strong performance by the Central region in its own right. The Central NB economy has performed very nicely over the past decade and shows promise for the years ahead.

The Economic Base

The Strategic Plan recommends placing priority attention on the region's "economic base" and the industries and businesses that comprise this segment of Central NB's economy. The *economic base* is the "external" sector of the local economy, that is, the economic sector for which demand is independent of local level activity. More than anything else, the performance of the *economic base* defines the long-term performance of the economy. Why is it so? The demand in the non-basic sector of the economy (retailing, services, etc.) is dependent on the level of local economic activity. Thus it is constrained in its growth by the local demand, whereas the basic sector is not subject to such a constraint. Thus, by growing, the *economic base* creates jobs and raises the level of local economic activity, allowing the non-basic sector to grow. The engine of economic development in a region is therefore the basic sector of the economy.

The concept of the *economic base* was initially developed for rural areas. For a small town or a rural area, the definition of the *economic base* is relatively simple: it usually encompasses the manufacturing sector and the primary sector (farming, forestry, etc.). In a large city, the definition is usually more complex. The primary sector is usually non-existent. Part of the manufacturing in a large city is also non-basic, as some products are made for the local market (ex: sash and doors, machine shops, baked goods, etc). What one also finds in the economic base of a large city are services of all types: government services (in government towns such as Halifax), business services (head offices, etc), transportation, warehousing, information services, etc. It is usually difficult to differentiate exactly the services that are basic from those which are non-basic. One should also distinguish between goods and services sold to the "hinterland" and those "exported" to other areas. Any large city has a "hinterland" to which it sells services. But the demand for goods and services by the hinterland is constrained by its own level of economic activity and thus these activities do not really belong to the *economic base*.

Thus, any determination of what belongs to the economic base involves a certain amount of arbitrariness. Usually, the availability of data dictates some rules of classification to which a purist might object. In our analysis we should use a particular definition of the economic base, which leads to a manageable survey of the local jobs in the economic base. Included in our definition of the economic base were some of the following establishments:

- primary processing establishments
- manufacturing establishments
- warehousing and distribution centers servicing more than the Central region
- tourism attractions and fixed roof accommodations
- regional and head offices of businesses with establishments outside the area
- government units with Provincial, Maritime or Atlantic jurisdiction

Part of the situational analysis entailed defining and assessing the importance of the *economic base* of the region and identifying the companies that constitute this segment of the economy. A list of the sectors and sub-sectors that comprise the *economic base* in the region, including minimum and maximum employment levels of the firms in these sectors as at the end of 2002, is attached in Appendix D.⁴ By Enterprise Centrals definition, the *economic base* of the region included 191 establishments that provided 3994 jobs at the time.

The total size of the *economic base*, as defined, represents about 12.8% of all jobs in the region (total labour force) at year-end 2002. Primary processing and manufacturing are, by far, the most dominant segments of this aspect of the region's economy.

- Agriculture, Forestry, Fishing & Hunting (primary) provide 1792 jobs (45% of total employment) in the economic base. (1217 of these jobs are in logging).
- Manufacturing consists of 1609 jobs (40.3% of total economic base employment).

⁴ All firms in the economic base should be interviewed in 2003 and assessments made as to which are dynamic firms with growth potential and which are not. The objective is to identify those companies with whom EC and its partners can and should work, on a proactive priority basis, to help facilitate growth and expansion (or maintenance) to accomplish its purposes.

- Knowledge-based (as defined) provides 64 jobs (1.6%) of the economic base.
- Tourism, as defined, employs 529 people (13.2%) of the region's economic base.

Employment in the economic base, using Statistic Canada's numbers, increased by approximately 350 jobs (19.5% of total increase in the labour force) from 1996 to 2001. This number will be used to target growth in the economic base over the next four years.

Conclusions

Based on the comprehensive analysis of the Central NB regional economy, a number of conclusions were drawn to help set the stage for a regional development strategy. In so doing, it should be kept in mind that the real purpose behind strategy in a CED context is to get everyone moving in the same preferred direction - so that scarce resources can be applied to where they will make the greatest difference. The foregoing analysis indicates the following:

- Central NB's economy has experienced positive growth in terms of population and economic expansion, relative to most of the Province, over the past decade.
- The major areas of growth were in communities adjacent to the City of Fredericton.
- Youth out-migration was lower in Central NB than in most rural areas of the province.
- Central's educational and population levels are comparable to those of the province.
- Central's labour force growth rate was more than twice that of the province and unemployment rates fell more dramatically in the region between 1996 & 2001.
- Central NB is primarily a resource-based economy (wood and agriculture).
- The region's natural resource base is limited (especially wood) for further primary processing (at least during the next twenty years or so).
- Long-term trends in commodity prices show a consistent drop.
- The region's primary processing industries (businesses) are generally at maturity (or in decline).
- Because of limitations on primary resources (especially wood), Central NB must look for other means to sustain or enhance employment and income levels.
- Resource-based industries will need to continue to rationalize jobs through the application of technology and more efficient systems to stay competitive.
- Processing of natural resources at the current levels will not result in more or even stable employment (technology will, of necessity, continue to replace people).
- Central NB knows wood and agriculture and should seek to maximize its potential in these sectors. To do so, it must move up-scale (value-added).
- Moving up-scale will require increased exporting to markets outside the region.
- Exporting to markets outside the region will require resident firms to have world-class business practices and processes - with a world-class management and labour.
- Value-added manufacturing firms selling into export markets spin off the highest degree of economic benefits to the home base (region).
- Though the Greater Fredericton region has a fledgling KBI sector, it is not likely to produce the necessary jobs (& income levels) in Central NB to replace those being lost in the resource sector, at least not for some time to come.

- The Central NB tourism sector can be improved through better organization at the regional level, more effective linking of travel generators and major attractions, establishment of a clear, compelling and unifying regional identity and more effective marketing of the region. However, this sector is not likely to grow to replace the jobs and income likely to be lost to the region through continuing rationalization and decline in the resource sectors.
- There are opportunities for additional primary processing – agriculture and mining. However, the potential jobs in these areas will not serve to produce the level of prosperity Central NB residents want, nor the standard of living to which they have been accustomed.
- There are opportunities associated with all the above areas – processing of underutilized raw materials, KBI, tourism and strengthening the region's role in providing business services and retail - and these should be maximized.
- The best means to meet the development aspirations (goals) of the Central NB's region will be to develop companies in the areas of manufacturing, including value-added wood and other resource products, with the capabilities and willingness to sell into the export market and to carry along other local companies with them.
- To maximize export market development will require a highly focused and dedicated strategy requiring that EC and its partners place primary attention on making for such export-focused development to happen; i.e. placing priority attention on the regions "economic base" and the companies that comprise it.
- The Central region might consider pursuing customer contact center businesses (Call Centers) and similar capital investments (as other regions are doing) as a means, in part, to infill during the period of time its value added strategy begins to produce noticeable (measurable) results.
- Maintaining and enhancing the region's population base, especially educated and talented youth, has to be a priority consideration in any development strategy for the region. The latter will require the availability of good business and career prospects combined with appealing and varied life-style options.
- The future economic well being of Central NB will depend primarily on two things: 1) a strong and growing City of Fredericton, and 2) continued expansion of value-added manufacturing for export markets (with priority attention on the region's economic base and constituent firms).
- Enterprise Central should, therefore, work in close collaboration with Enterprise Fredericton to maximize the entire region's growth potential to mutual advantage, and place priority attention on strengthening Central NB's "economic base" and the companies that comprise it.
- A working relationship with Enterprise Fredericton should be viewed as symbiotic; i.e. should seek to build on one another's strengths. For Central NB this could mean improved air services (especially international connections), ready access to science, research and consulting capabilities (to support "clustering", etc.), access to world-class training and education, urban core amenities, shopping and entertainment. For Fredericton, it could mean a strong supportive hinterland, stable and expanding primary processing and manufacturing firms with business service and training requirements, available labour force and an expanding consumer population close at hand.

A DEVELOPMENT STRATEGY FOR CENTRAL NB

Strategy is simply the selection from among alternatives the means by which to accomplish goals more effectively. The goal pursued is the economic growth of the Central NB region. The means at hand are, first the resources of Enterprise Central NB and its Partners, and second, the willingness of the Central region's business community to get involved in the economic development of the region.

The essence of strategy is to focus attention and resources on a few key areas and to impact them in such a manner and to such a degree that they spin off development in other areas of the economy – thus creating synergy. An appropriate analogy is that of a logjam. The key to unlocking such a jam, old-timers advised, was to find the two or three “key” logs and blast them free. This would “unlock” the pile-up and set the backlogs in motion. So it is with strategy when properly designed and executed.

The proposed strategy is presented in this chapter together with the main elements of the action plan that stem from it. Since a strategy implies by definition, setting priorities and thus making choices, justification of these choices will also be made in this chapter. Section 1 presents the strategy and its justification and section 2, the key elements of the action plan.

1. The Strategy

During the five-year period 1996 to 2001, total employment in the Central region increased by 1735 jobs or 5.6%, according to the Statistic Canada Census. This increase illustrates very positive growth in Central NB relative to the rest of the province. The challenge going forward will be to consolidate these gains and to build on them so as to sustain and, hopefully, increase future growth and development in keeping with projected goals and objectives. The proposed strategy is intended to do just that.

Improving on past performance will require clearly defined goals and objectives, measures and targets (with timelines) against which to assess and benchmark performance to ensure progress is occurring as planned, and if not, to allow for timely program adjustments to be made. The first step in this process is to set realistic, yet challenging (stretch) targets for EC and its partners to aim. After a careful examination of the potential of the Central NB economy, the goal proposed for the next four years will be that of an annual average growth rate of 2.5% in employment in the economic base, or roughly 400 net basic jobs.⁵

⁵ A four-year target is proposed to coincide with the next Statistics Canada census. This will allow the region to apply the census data in the assessment of the region's intermediate-term goals.

Present employment in the *economic base* is 3994 jobs. A 2.5% per annum growth rate would represent a total net increase of 100 jobs per annum in the basic sector for a total of 400 net jobs. Total employment in Central NB could increase from the present 31,245 to over 32,000 in four years, if that goal is met, due to the *multiplier effect* of such positive change in the *economic base* and parallel activities in the local economy.

If this target seems insufficiently ambitious, given the region's recent history, we should keep in mind that we are referring to *jobs in the economic base and net jobs*. The number of new jobs to be created will need to be substantially higher in order to compensate for those likely to be lost as a result of normal attrition through business closures and employment rationalization. EC will, therefore, be required to assess potential job losses in the economy and establish an estimated gross employment target to ensure it hits its net projections. This should be done, by means of an interview process, with all companies in the economic base during the first six months of Strategic Plan implementation.

How plausible is such a goal of 400 net basic jobs in the regional economy? Here is one scenario, which demonstrates clearly that it is an achievable target.

- 50 net jobs in the primary sector could be created. These jobs would come from further exploitation of underutilized species of wood, silviculture initiatives, development of a berry industry, and establishment of a processing plant. This total could result from 50 jobs from 2 new establishments, 50 jobs from the expansion of existing businesses, and the loss of 50 jobs as a result of normal attrition from rationalization and closures.
- 250 additional jobs could be created in manufacturing firms. This total would result from the creation of 150 jobs in new firms, 150 jobs in existing (dynamic firms) and a loss of 50 jobs in existing businesses.
- 70 net jobs in KBI, including Customer Contact Centres could be realized through a total of 60 jobs from new firms, 20 from existing business expansions and a loss of 10 jobs from closures or cutbacks in the sector.
- 30 net jobs in tourism could be realized by way of 15 jobs with new establishments and an expansion of 15 jobs in existing businesses.

Such a scenario is possible with proper strategy and execution. In other words, 400 net basic jobs over a four-year period is an attainable goal. However, such a goal should be considered as a beacon. It is a point toward which the strategy aims. If the strategy is very successful, the goal might have to be revised upward. Similarly, if business conditions suddenly change, the goal might become unrealistic. The key role of such a goal is to assist Enterprise Central and its partners in designing a strategy that makes the best use of limited resources. It also indicates what can be possibly achieved by a concentrated effort.

The proposed strategy is the following:

The growth of the Central NB economy will rest first and above all, on the dynamic character of its business community. The success of the business community will be enhanced substantially by the timely, focused collaborative and cooperative support efforts of EC and its partners, including their political masters. The region's business community will be encouraged and supported to direct their talents and energies on proactively growing the region's economic base (and companies comprising that base) through sector specific strategies as a priority focus. This will involve:

- *Strengthening and building on the region's primary industry base (forestry and agriculture);*
- *Pursuing value-added manufacturing, with a slavish devotion to exports and exporting;*
- *Maximizing the region's tourism potential;*
- *Nurturing Knowledge-based businesses and capturing some Customer Contact activity;*
- *Strengthening the entrepreneurial base of the region (to achieve greater local ownership of the regional economy and produce sustainable employment);*
- *Managing a mutually beneficial working relationship with Enterprise Fredericton;*
- *Utilizing clustering and business network strategies, especially to address export markets;*
- *Enterprise Central providing the necessary leadership to make things happen.*

The key components of this strategy are the following:

Primary Processing

Wood: The Forestry Sector Task Group identified job creation and fibre availability as the two most pressing issues with respect to the wood sector. The Task Group agreed that the region's wood fibre is being depleted at a rate faster than replacement and that more silviculture, and better wood utilization, is required on both crown and private lands to sustain the industry in the future. The Group identified that no programs currently exist to ensure silviculture practices on private woodlands.

The Task Group emphasized the need for training of machine operators, merchandisers and forest workers generally on the importance of "highest value and best end use practices" with respect to wood utilization. They also identified the challenge for sub licensees in securing wood for small business operations and competition for the wood supply generally. The uncertainty of wood supply is causing forest-based businesses to look for alternatives to diversify their operations.

The forestry sector faces many human resource development challenges, especially the inability to find sufficient numbers of qualified workers. Among the reasons cited is the perceived failure of the educational system to encourage students to consider careers in the forest sector, and the seasonal nature of work – poor career prospects.

Some new areas proposed for training by the Task Group included merchandising, business, accounting, general management/supervisory roles, including business and financial training for small business operators. The Group also stressed the importance of helping all woods workers understand the necessity and importance of utilizing specific harvesting techniques, the rationale behind specific silviculture treatments and what they can do to assist these efforts as they carry out their operations.

The Forestry Task Group also stressed the importance of partnering as a means of developing and sustaining the forestry sector businesses in the future. They mentioned the important roles and services of government, the New Brunswick Federation of Woodlot Owners (which represents about 25% of the harvested wood in the province), the Wood Products Association of New Brunswick and the New Brunswick Forest Products Association, all of which are considered as partners in managing and growing the forest industry in Central NB.

The Forestry Sector Task Group recommended that the principle emphasis during this four-year Strategic Plan implementation period should be to maintain the current level of business while looking for value-added opportunities.

Agriculture: The Agriculture Sector Task Group predicted that there would be fewer farms with increased production in the region over the next four years. The net result, they contend, will be that production and employment levels will remain the same. The Task Group proposed that the establishment of a processing plant within Central NB – to process a variety of products – is the only reasonable objective that would provide for any sort of employment and production growth.

The Task Group also proposed a change in the labeling of food products in the supermarkets of the province so as to clearly indicate that “local” means “within the local region”.

The Agriculture Task Group recommended education, promotion and support for development of the blueberry industry in the region. The Group expressed the belief that, due to the very high level of blueberry producing soils, this sector could become the fastest growing sub-sector within agriculture.

With respect to human resource development, the Task Group suggested that the agriculture industry could only achieve higher levels of productivity if the Department of Agriculture works with the industry sector to keep them aware of new developments. It was suggested that the department could maintain a list of people to contact for information or provide a list of available funding for purposes of taking courses. Communication, they advised, is the key.

The Group expressed that Enterprise Central exercise its leadership role in helping to organize the sector to ensure the realization of the Action Plan.

Value Added Manufacturing:

It is believed that the manufacturing sector offers the best prospects for expanding the region's economic base and generating sustainable employment going forward. Central NB already has a fairly good base of such industries - especially in metal fabrication - but will need to focus on export markets in order to grow. The local market is just not sufficient in size to support much in the way of expansion and considering the trend towards continuing rationalization in primary processing, local demand is not likely to grow in the short-term - the timeframe for this strategy.

Though manufacturing, through market-oriented growth, is the recommended priority focus for growing the region's economy over the next four years, the challenge will not be easy or painless. For industries to grow, they will need to focus on diversification and new product development for the export market, while still meeting local demands. To be competitive in the global marketplace, companies must modernize and adopt advanced manufacturing technologies, processes and practices in their operations, and pay particular attention to innovation, quality assurance and product standards.

In order to compete globally, businesses need to understand and adopt productivity-enhancing manufacturing techniques or "advanced manufacturing". Advance Manufacturing is an approach based on a commitment to continuous improvement and enhanced competitiveness. It includes:

- a. An unrelenting focus on customer success;
- b. Total quality in all aspects of business;
- c. Systematic continuous improvement and elimination of non-value adding activities;
- d. Employee involvement, training and empowerment;
- e. Trust-based partnerships, networks and relationships.

Companies also need to work collaboratively in an environment that is conducive to growth - "clusters".

The regional sector has many strengths on which to build: some well established export contacts; good location, relatively low raw material and overhead costs, especially wood; an available and adaptable workforce; a relatively good concentration of manufacturing firms; ready access to training and favorable exchange rates.

However, there are weaknesses and constraints: a lack of cooperation between businesses in the sector, especially for exporting projects; Canada customs; information from some government departments; freight costs; access to resin for plastic companies; research/testing for new equipment; difficulty in accessing specialized material; lack of business experience among small business people; underutilization of training programs and facilities; limited abilities in global marketing; lack of or out-of-date advanced manufacturing practices (lean mfg., quality assurance, product standards, cost-control systems, etc.); shortage of certain technical-skilled employees; etc.

The Task group identified a number of opportunities that could be pursued by the region: plastic manufacturing (extruders, recycled products, distributed plastics); moulded window frames and doors, metal recycling and stamping; R& D, forestry products, etc.

In addition the need for a small business network (to get manufacturers ready for export marketing); partnerships with other existing businesses, including networking and clustering were identified.

Knowledge Based Industry:

No sector Task Group was established to explore this sector. However, the data collected on the sector shows that there is a minimum of 20 companies, employing a maximum of 64 employees spread throughout the Central NB region (that fit within the *economic base*). This provides a small foundation upon which to build. Given the relative success with KBI in Fredericton, Central NB should look to exploit this sector as well.

Also, the trend towards working from home (home-based businesses) cannot be ignored, especially given the region's proximity to the City of Fredericton. Central NB has a reputation as a nice place to live and raise a family. People who are flexible with respect to job setting may find it attractive to live and work out of their home in the region and, if successful, expand their activities into a business here as well.

Finally, Customer Contact Centers are being established in smaller communities throughout New Brunswick and there is no reason to think that this industry could not find a home in any of the towns throughout Central, especially considering the region's relatively well-educated workforce.

To further exploit the e-business and e-training segment of this sector, a number of opportunities and requirements should be addressed:

1. Strengthen networking opportunities within the community (cross-pollination);
2. Confirm list of KBI firms in the region and assess their growth potential;
3. Provide a forum or vehicle through which to develop and support this sector;
4. Strengthen partnerships with governments and supporting agencies;
5. Have Enterprise Central play a broker/facilitator role to help organize sector;
6. Establish industry advisory capacity with schools and training facilities.

There are threats and constraints with respect to development of the sector as well:

- Eroding markets
- Fragility of the sector
- Fast pace of change
- Absence of business and marketing skills among technically trained players
- Business support infrastructure

Tourism:

Participants in the Tourism Sector Task Group agreed that the creation of jobs in tourism is the ultimate goal of this Strategic Plan. A primary consideration proposed by the Task Group to realize the region's tourism goal, is to redirect some of the traffic that bypasses Central NB via the TCH throughout the region. The Task Group contends that highway signage is minimal and fails to alert drivers to points of interest within the region.

The opportunity exists, the Task Group contends, to create a number of "scenic drive loops" in the region. There is a high-speed exit and entry to the east and west of Fredericton onto the Vanier Highway and Prospect Street. There is also a loop from Oromocto West through Lincoln, along Waterloo Road, Queen Street, Woodstock Road continuing to the old Trans Canada Highway to Longs Creek. This, the Group proposed, may be an inexpensive way to encourage travelers to leave the TCH. New signage may help to trigger this opportunity.

The Task Group sees "clustering" as providing an opportunity to network a variety of services that are targeted to the specific customer type and thereby increase business opportunities.⁶ In Central NB, there are a number of demand generators that are, too often, stand-alone operations. In many cases, there are other tourism operations located within a short drive of the demand generator, but customers do not know about them, or have a perception that they are too far away. Clustering, the Task Group recommends, can be used to inform the customer, suggest other activities and change customer perception.

Because Central NB is a large and diverse region, the use of sub-regions may be practical in the creation of workable clusters. The regions that were identified by the Task Force are: Upper Saint John River (above Mactaquac Dam); Lower Saint John River (below Mactaquac Dam); St.Croix River; and Grand Lake. The Group explained that a key demand generator exists in each sub-region. In the Upper Saint John River region the major tourist attraction is King's Landing. Gagetown is believed to be the major attraction for the Lower Saint John River region. The villages of Harvey and McAdam could play a role, similar to Gagetown, in the St.Croix River region. Finally, with development, Grand Lake itself could be a demand generator in its region.

Another important process that can be facilitated by clustering, the Task Group contends, is the creation of brand identity. There is no single aspect of advertising and promotion of greater importance than brand recognition. The entire Central New Brunswick area is in dire need of a marketable brand that can drive the flow of tourist traffic into the region. The Central NB region could develop a brand identity based on the *inland waterways* of

⁶ Clustering is defined here as the process of creating functional connections between tourism operators and service providers within a region. Clusters can be developed around a central theme or icon, known in the industry as a "demand generator". Clustering can be physical (building operations in physical proximity) or virtual, creating linkages through websites and by cross advertising within area tourism operations. In addition a number of themes (arts and crafts, local history, culture, music) can form part of the cluster. Seasonal clustering can also be used to extend the tourist season by introducing events and activities to fill periods of low activity. For example, hiking trails can be used as cross-country ski trails in the winter months. Trails and seasonal roads can also be used to create snowmobile routes for winter recreation.

the region. The rivers and lakes of Central New Brunswick parallel the cultural development of the people. These waterways provide a resource for sporting activities, recreation, learning and cultural exploration.

Infrastructure: the Task Force identified a number of infrastructure needs. They identified that many of the business owners have relatively small tourism operations. This creates a problem of scale. It is very difficult and expensive for small businesses to individually purchase advertisements in existing tourist publications. Advertising costs are so high as to be prohibitive and cannot be justified on the basis of increased revenues resulting from the ads. Likewise, the small tourism operators have little or no budget for creating and maintaining an Internet website. This is a critical area since many travellers now use the Internet as their primary travel-planning tool.

The Trans-Canada Trail system is believed to be an important piece of infrastructure to encourage family recreation and eco-tourism. The existing trail system emanating from Fredericton to the west now stops near Island View. If this segment of the trail could be extended upstream - along the Saint John River toward King's Landing - it would make the region more attractive to visitors.

The lack of access to High-speed Internet service is a serious infrastructure deficiency. Operators who wish to use the Internet for promotion and booking are unable to provide the level of service and response time demanded by the public when restricted to using dial-up Internet connectivity.

The type of accommodations available in the Central New Brunswick area may not be of the appropriate type to suit demand. Off-season occupancy rates are low, while during the high season, the demand often exceeds availability. The sector Task Group identified that many visitors request cottage type accommodations and few of these exist in the region. There is a clear need for the construction of new, well-equipped cottages. In areas of low demand which are unable to economically support the building of multi-unit accommodations, a system of inspection and accreditation could be used to allow individuals to rent rooms in private residences.

Rest stops could be developed along the scenic loop. These rest areas could include tourism information booths, restaurants, washrooms and gas stations.

Many historically and culturally interesting homes exist in the region. However, many of these are overlooked because of a lack of heritage restoration programs. An opportunity exists to capitalize on this resource by preserving, restoring and showcasing these.

Because inland waterways have been identified as a common theme across the Central New Brunswick region, the infrastructure associated with recreational use of the waterways is vital. This includes the maintenance of existing marinas and the construction of new marine facilities. Recreational areas, around the waterways, could be improved to encourage use by families with children. This could include beach clean up and improvement and the creation of picnic and play areas.

Human Resources: Both seasonal and year-round tourism operators face a challenge in hiring a sufficient number of qualified workers. The reasons for this shortage include the post baby-boom bubble, a general decline in the provincial population, and a competitive labour market that pulls young workers to other industries. One short-term solution may be the hiring and/or retraining of recently retired individuals.

In the longer term, it is important to create attractive career opportunities for individuals about to enter the workforce. As a means of encouraging potential candidates, training opportunities must be available in the Central New Brunswick region. While on-the-job training is common among large tourism operators, there is a real need for formal training facilities to provide a pool of appropriately trained workers.

Partnership: The government of New Brunswick has been identified as being the partner of greatest strategic importance in the tourism sector. The role of the provincial government is critical in the following areas: highway signage; broadband infrastructure; training; marketing; heritage preservation; and developing inland waterways. With respect to marketing, it is important to create a regional identity; market that identity consistently to enhance brand awareness; and make provincially produced or endorsed tourist literature accessible for small operators (by keeping costs minimal).

The Atlantic Canada Tourism Partnership may be beneficial to the tourism sector in Central New Brunswick by providing a single point of contact to allow customers to access events, accommodations and booking information over the Internet.

Snowmobile clubs in the area are an important resource to assist in the development of winter recreation opportunities.

The N.B. Trail Association has already expressed interest in extending the western end of the Fredericton trail toward King's Landing. This organization is enthusiastic that collaboration with Enterprise Central New Brunswick will be mutually beneficial.

Entrepreneurs from New Brunswick First Nations may be important partners in developing cultural interpretive sites, which have been proposed to complement existing attractions.

The Saint John River Society and other conservation minded groups could be valuable partners in efforts to improve the waterways.

Business operators and entrepreneurs from the Central New Brunswick region are potential partners in this strategic plan. This includes more than just traditional tourism operations. This could include restaurants; bed and breakfast operators; outfitters; transportation suppliers; sports and leisure businesses: as well as numerous others.

Regional Service/Retail:

As proposed in the Sector Analysis section of this paper, the City of Fredericton is, unquestionably, the service and retail center for the region. However, Central NB has retail and service-to-business requirements that will only be met in part by the City. It will be important to the Central region's economic well-being to: 1) help ensure Fredericton's continuing success in this broad-based sector (jobs for residents, support services to business, life-style options, etc); and 2) address the need and opportunity to capture those elements of the service/retail sector that can and should be provided from within the region, including the service-business opportunities associated with traditional industries – to improve their efficiency and help them move up-scale in new markets.

Maximizing development opportunities in this sector would suggest the importance of two separate initiatives: 1) working to build and maintain a positive and mutually beneficial relationship with the City of Fredericton through Enterprise Fredericton; and 2) working with Central regional businesses and entrepreneurs to help address the needs and gaps in retail and service-to-business requirements across the region.

Clustering, Networking, Strategic Alliances:

The principle strategy proposed in this report is to focus attention and resources on strengthening the region's economic base, with priority attention on manufacturing firms and exporting, while maximizing opportunities in other priority sectors. The strategy also stresses the importance of having EC and the Partners place major emphasis on working to assist companies through a more sector-based approach. Coupled with this is an approach that stresses strategic alliances, business networks and clustering as well as the establishment of the necessary support infrastructure (organization & electronic) to enable such industry collaboration to happen.

Collaboration, cooperation and strategic alliances are, increasingly, becoming important ways of doing business around the world. Businesses of all sizes are using various forms of "joint venture" and networking arrangements to help them reduce costs, increase efficiencies and market more effectively. One such collaborative approach is the development and use of clusters. "Clustering is the grouping together of a mix of businesses that enable each of them to benefit from each other's sales, customers and markets". The importance of exploring development of a cluster strategy was mentioned in a couple of the sector task groups. Considering the concentration of forestry and metal fabrication businesses in the region, a "clustering strategy" might be considered for these two sectors. Also, interest in clustering was raised by the Tourism Task Group as well.

To maximize a clustering approach and "sector development", it is recommended that EC and the Partners also explore how they can assist regional businesses network more effectively, both electronically and organizationally. It is not uncommon to hear that, "the companies and countries that learn to use their networks most efficiently are those that will thrive". New York Times columnist Thomas Friedman, alluded to this when he wrote, "Power will flow not simply to those (regions) who are the most wired, but those

who are the most creative at bringing together firms, governments, capital, information, consumers and talent in networked coalitions that create value." (The Lexus and the Olive Tree, p. 201)

Entrepreneur Development:

The importance of fostering entrepreneur development was mentioned throughout the strategic planning process. Entrepreneurship is not only important to fostering business growth and development in meeting short and intermediate-term goals, but is essential to achieving the longer-term goal of the region gaining greater control over its economy. The best (most likely) way to achieve the latter is by fostering entrepreneurship so that aspiring entrepreneurs might be motivated and prepared to establish and grow successful local businesses. Thus, locally owned companies are more likely to establish their corporate offices (presence) in the Central region where the maximum economic benefits are realized through reclaimed profits, executive salaries, R&D, investment, etc.

Entrepreneurship and business counseling have been an important part of the program offerings of the Greater Fredericton Economic Development Corporation (EC's predecessor). Many of the program initiatives that were previously offered should continue. However, it may help to produce greater results if staff is encouraged to approach this aspect of their work with the priorities outlined in the strategy Action Plan clearly in mind. EC must continue to work with those business people who come through the enterprise central's doors. However, they must be very proactive in giving priority attention to those businesses on the "high priority" list. This, the EC Board of Directors must understand and support.

Leadership, Communication and Branding:

The role and responsibilities of Enterprise Central NB are different from those of its predecessor organization, the GFEDC – at least as defined in recent history. The mandate is much broader today, encompassing "community economic development". EC clearly has the responsibility to lead – to be the lead agency for fostering, promoting and coordinating economic development in the region and liaising with senior levels of government in this regard. As such, EC must not only lead, but be seen to lead. An important aspect of such leadership is the establishment and management of a solid, respected public (read media) profile in the region.

EC must be prepared to communicate clearly its economic development plans and programs to the regional community and to speak up on economic development matters that affect (or threaten to affect) the region. It must provide the community with a clear and confident sense of where the region is heading and how it intends to get there. Failure by EC to play this important role leaves a vacuum into which others, sometimes less informed and accountable, will gravitate. This can cause problems for the region and serve to confuse residents (including the media) on what should or needs to be happening to move things in a positive direction.

It seems relevant to recall that three of the ten Strategic Issues referenced the importance of EC leadership and communication: 1. The need for a "unified and healthy rural community", 2. Establish EC's profile in the region, and 3. Working cooperatively within the region. It is expected that, should EC play its leadership role effectively, these issues and others will be addressed. EC must lead and be seen to lead, therefore, and this means effectively planning and managing communications and public relations.

It needs to be accepted, however, that some aspects of the Enterprise Central's work will and must be confidential; e.g. dealing with business clients, prospects, and investment opportunities.

Finally, the tourism sector Task Group raised the issue of "branding". They spoke of the importance of developing and articulating a clear, positive, respected and consistent "Central regional" brand for their particular sector. Perhaps the real opportunity lies in considering the image of the region as a whole – its "brand". For as the McKinsey Consulting Team contend, "A powerful global company and a powerful country (region) need to have "strong" brands that can attract and hold consumers and investors... To build brand equity, a company needs to do two things: first, distinguish its product from others in the market; second, align what it says about its brand advertising and marketing with what it actually delivers".

2. The Action Plan

Two general types of activities can be found in the proposed action plan. Some fall under responsibilities of the development organizations (EC and the Partners) and those to be undertaken by the business community, either through existing organizations or through ad hoc committees to be established to deal with a specific mandate, or through individual initiatives. Thus, the proposed action plan embraces much more than EC resources. However, the leadership of EC, and of the active support and involvement of the key business organizations in the region, is essential to ensure that the challenges underlying the action plan are addressed. Of major importance will be the *changing role of Enterprise Central* (from that of its predecessor). It is proposed that EC place much greater emphasis on working with and through sector groups to support industry and business development initiatives, in addition to its more traditional one-on-one business support and counseling efforts. This will mean that EC will work to bring industry sectors together, where and when possible, and provide support and facilitation services to enable the industry to more collaboratively and cooperatively meet its needs and undertake joint projects and initiatives. To facilitate such "group work", EC should explore the application of "network solutions", especially the Internet.

The action plan is divided into nine sections. The first section presents the objectives to be pursued by the action plan – short-term, intermediate-term and long-term. The remaining sections follow the same format as that presented in the previous section – primary processing, value-added manufacturing, knowledge based industry (KBI), etc. The action plan endeavors to build on the strategies earlier outlined and to propose specific initiatives to be implemented by EC and its partners (and others) over the next

four years so as to accomplish stated objectives. Though the emphasis, and assessment, will be on the short-term goals, as measured with respect to jobs and business growth and expansion, the longer-term goals are presented to help guide development initiatives so as to ensure the longer-term interests of the region are not compromised by short-term expediency and neglect.

i. The Goals and Objectives

Definitions: A goal is a statement of general direction or intent - an end toward which an effort is directed (an "end" is an exact & tangible result). An objective is a specific and measurable accomplishment (level of achievement) to be achieved within specified time, resource, and cost constraints. Actions are tactics used to reach and achieve objectives; i.e. to implement strategies. Tactics help answer the question: how do we get there? (They must also be complementary to the mission). Action steps are the activities detailed in the plan that help an organization meet the objectives, including financial objectives.

Goals:

Enterprise Central has established short-term, intermediate-term and long-term goals. In the short-term (four years) the desired results will be on jobs and business growth and development:

Short-Term Goals:⁷

Goal: To increase the number of jobs in the region

- Jobs:
 - To create
 - To maintain
- Businesses:
 - To create
 - To expand

Intermediate-Term (5-7 years):

- To increase employment in the region:
 - To increase number and range of employment opportunities
 - To reduce unemployment and underemployment
 - To increase labour force participation rates
- To increase income in the region:
 - To increased personable disposable income
 - To increase earned income closer to national average
- To enhance the tax base of regional communities:
 - To maintain
 - To expand
- To decrease social dependence:

⁷ Because the focus is on the intermediate-term (three years), it might be wise to focus on this first goal for measuring progress; i.e. to maintain and increase the number and range of employment opportunities. This in turn should be tied to the number of new and expanded businesses. There will be other "lead indicators" employed as well; e.g. objectives tied to infrastructure and service/process improvements, objectives for labour force development and training and objectives for engaging the "partners".

- To reduce the need for social assistance payments
- To reduce the level and rate of regional out-migration
- To increase business performance:
 - To increase regional output of goods and services, especially in "basic sectors"
 - To increase exports of value added goods and services
 - To increase R&D and innovation in the region
 - To increase business investment
 - To increase regional productivity

Long-Term (10 years +):

- To enhance local control over regional economy - more business decisions locally; e.g. more regional/head offices
- To achieve greater "self reliance"; i.e. to increase the number (ratio) of locally-owned companies in the *economic bas*.
- To decrease the average age of the workforce
- To increase the working age population ratio (to reach or exceed ____ % of provincial average on or before 2012)
- To increase real personal income per capita by 7 percent to reach or exceed the ____ % of provincial average by 2012
- To ensure that Central NB is among the top 3 NB CEDA regions in R&D expenditures per capita by 2012
- To increase labour productivity by 10 percentage point to reach or exceed ____ % of provincial average by 2012
- To increase the percentage of exporting firms from ____ to ____ and the percentage of its non-resource-based exports from ____ to ____ of total exports by 2012.

Objectives:

The overall goal to be pursued by this action plan is to stimulate the development of the economic base of the Central NB region and to diversify it. Goals are always more functional when they are qualified, for they become measurable and the review exercise becomes much more significant. As the saying goes, "you usually get the results for which you measure." On the other hand, there are many factors independent of the enterprise center, or Central NB residents for that matter, which will affect the performance of the local economy, and which can diverge significantly from the set objectives without reflecting on the specific performance of Enterprise Central. Arguments of this nature are often advanced by those who object to quantified objectives.

To set aside such arguments, which have certain validity, it is useful to consider the set objectives as quantitative benchmarks against which the outcome will be assessed. Numerous factors could then be advanced to explain deviations between the benchmark and the actual outcome, the performance of the enterprise centre being one. It is the responsibility of those involved to review the process to assess the importance and contribution of each factor.

Tables 12 and 13 present the proposed quantified objectives over a period of 4 years. Annual objectives will be set in yearly action plans. To illustrate the challenge behind each objective, the performance of the past five years (1996-2001) has also been presented.

Table 1

FOUR YEAR EMPLOYMENT OBJECTIVES				
	Estimated Actual 2002	Objectives		Performance 1996-2001 changes
		2006	Changes	
<u>Primary Processing</u>				
New firms	—	50	50	
Dynamic and high potential firms	—	—		
Other firms	1792	000	0	
Sub-total	1792	1842	50	
<u>Manufacturing</u>				
- New firms	—	150	150	
- Dynamic and high potential firms	000	000	132	
- Other firms	000	000	-160	
Sub-total	1609	1859	250	
<u>Knowledge Based Industries</u>				
- New firms	—	60	60	
- Dynamic and high potential firms	—	—		
- Other firms	000	000	00	
Sub-total	64	134	70	
<u>Tourism</u>				
- New firms	—	15	15	
- Dynamic and high potential firms	00	00	00	
- Other firms	00	00	00	
Sub-total	529	559	30	
<u>Other</u>				
- New firms	—	000	000	
- Dynamic and high potential firms	00	00	00	
- Other firms	000	000	00	
Sub-total	000	000	000	
Total	3994	4394	400	000 (est.)

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- Other firms	000	000	00	
Sub-total	000	000	000	
Total	3994	4394	400	000 (est.)

Table 2

NEW ESTABLISHMENTS		
	ACTUAL 2002	New Firms Objectives 2002-2006
<u>Primary Processing:</u>		
- Local firms	n.a.	
- Non-local firms	n.a.	
Total	65	
<u>Manufacturing:</u>		
- Local firms		
- Non-local firms		
Total	93	
<u>Knowledge Based Industries</u>		
- Local firms		
- Non-local firms		
Total	20	
<u>Tourism</u>		
- Local firms		
- Non-local firms		
Total	13	
<u>Other:</u>		
- Local firms		
- Non-local firms		
Total	0	
Total	191	

ii. Primary Processing

Wood: As mentioned, the opportunities for expansion of the forestry sector are limited. However, there are opportunities and constraints that should be addressed. These fall into five main categories or sets of action initiatives: 1) sustaining and upgrading the resource (resource supply/maintenance); 2) maintenance of the current business base (business merchandizing and maintenance); 3) pursuing value added opportunities; 4) human resource development; and 5) infrastructure and support services.

1. Resource Supply/Maintenance:
 - a. Make representation to government to consider increasing the level of silviculture
 - b. Pursue government financing to support increased silviculture activity
 - c. Encourage province to make multi-year commitment to negotiated silviculture targets
 - d. Encourage government to give operators flexibility with respect to harvesting and silviculture that will provide incentives to encourage more silviculture activity
 - e. Promote maximization of species diversification
 - f. Promote woodlot owner management and certification development
 - g. Identify government, industry and woodlot association strategy for certification of private lands and lobby to speed up the process – long-term considerations
 - h. Explore fast growing aspen and other species
 - i. Support research into alternate fibers, imports and recycling
 - j. Promote the practice sustainable development
2. Business Merchandizing and Maintenance:
 - a. Focus on viability and strengthening the positions of existing leading manufacturers
 - b. Investigate diversification options to current businesses
 - c. Encourage modernization to maximize yield from input
 - d. Encourage value-added diversification strategies
 - e. Provide opportunities and incentives for all operators working with wood fibre to find marketable uses for wood waste
 - f. Set up wood yards in areas where feasible
3. Value Added:
 - a. Build off primary products through development of a "cluster strategy".
 - b. Explore value-added opportunities
 - c. Identify and put R&D activity into finding product opportunities for underutilized species
 - d. Identify opportunities to expand-value added and by-product businesses
 - e. Identify diversification strategies
 - f. Undertake to investigate some large value-added opportunities that small operators could contribute components to rather than each small operator trying to get into value-added on their own
4. Human Resource Development:
 - a. Work with NBCC and other service providers to deliver training programs in the Central region so that workers do not have excessive travel expenses
 - b. Work with high schools to create programs that expose students to the forestry sector - by identifying career opportunities and providing on-the-job experience through partnering with forestry sector operators

- c. Establish a wood merchandizing program to train workers, at all levels of production, to get best use of the wood fibre at each stage of the process
- d. Arrange training in: merchandizing, marketing, financial, general management and supervision, small business management and finance
- e. Provide workers with an understanding of the rationale behind specific harvesting techniques and silviculture initiatives so they can assist the efforts in their operations
- f. Identify diversification opportunities to increase work season
- g. Host Forest Entrepreneurial Day in the Central NB region.

5. Infrastructure/Support Services:

- a. Establish an electronic "bulletin board" on which various sector members can post activities on a timely basis; e.g. items wanted, upcoming events, industrial visits, etc.
- b. Have EC staff visit the sector businesses on a regular and timely basis (In the first 6 months following the adoption of this Strategy, staff should visit all businesses in the economic base and assess them with respect to growth and export market potential)
- c. Engage consultants to undertake "cluster concept" study.
- d. Seek to continue with regular meetings of the Forestry Sector Task Group as a means of encouraging sector cooperation and collaboration
- e. Explore "strategic alliances" for export market development
- f. Explore coop purchasing of materials and services

Agriculture: The Agriculture Task Group predicted that there would be few opportunities to increase business expansion and job creation over the next four years. However, the proposed a number of action plan recommendations:

- 1. Explore the establishment of a processing plant within Central NB to process a variety of products
- 2. The processing plant should be pursued as a cooperative, including all producers from traditional crops to newer crops, including blueberries, cranberries, mushrooms
- 3. Pursue a change in the labeling of food products in the supermarkets of the province so as to clearly indicate that "local" means "within the local region"
- 4. Petition the supermarkets (provincially) to identify the producer in the same manner as packaged goods are identified with the name of the manufacturer.
- 5. Provide education, promotion and support for development of the blueberry industry in the region
- 6. Encourage the Department of Agriculture to work with the industry sector in keeping them aware of new developments in the sector
- 7. Petition the Department of Agriculture to maintain a list of people to contact for information or provide a list of funding available to take courses
- 8. Identify ways to improve communications between the industry sector members and the Department of Agriculture (consider an internet-based solution)
- 9. Have Enterprise Central take the lead in organizing the sector to help implement the Action Plan.

iii. Manufacturing

The need to strengthen and expand the manufacturing sector, in order to grow the local economy, is very real but also challenging. To grow this segment of the local economy will require a highly focused and well-coordinated effort on the part of EC, its Partners and the industry sector members as well. A multi-pronged set of initiatives will be required to achieve this purpose. Proposed initiatives fall into 5 principle categories:

1. Market-oriented Growth:
 - a. Assist the sector firms with market intelligence efforts, including the identification and development of new markets.
 - b. Encourage and support increased marketing emphasis in companies.
 - c. Provide technical and mission support
 - d. Work with industry to put a small business network in place to get the manufacturers ready to make the jump into the export market.
 - e. Support a mini trade mission to Boston to allow a group of local manufacturers to meet with an industrial group – orientation/educational experience.
 - f. Assist companies in developing better marketing tools.
 - g. Support quality assurance programs and practices.
 - h. Promote and support strategic alliances for addressing export markets.
 - i. Approach federal government in an effort to sensitize Canada Customs to the particular needs of small exporting businesses.
 - j. Undertake a study on "import replacement opportunities" for manufacturing.
 - k. Help local manufactures identify a "market niche" for value-added products.
2. Advanced Manufacturing:
 - a. Promote and support the adoption and development of new technologies needed for product improvements.
 - b. Support modernization of manufacturing processes and practices through quality assurance and product standards.
 - c. Promote and support the commercialization and diversification of product lines.
 - d. Approach the NB government for help in identifying products that are needed in the marketplace.
 - e. Petition the province to re-evaluate the tendering process.
3. Human Resource Development:
 - a. Promote available training programs and facilities.
 - b. Provide/support training in export marketing, including the internet.
 - c. Provide training/support in Advanced Manufacturing processes and practices.
 - d. Provide seminars/workshops on forming and managing strategic alliances, joint ventures and clustering.
 - e. Provide formal training for small businesses, including marketing, human resource planning, organizational skills, finance and accounting, etc.
 - f. Establish task force to identify/address employment issues as identified by the Manufacturing Sector Task Group.
 - g. Request that NBCC or UNB offer a marketing/export symposium/night course through the winter months, providing a tax deduction for the company in the spring providing the opportunity to upgrade the expertise needed for their key personnel in the export marketing area.
 - h. Create an employment list and post to EC website to attract displaced residents.
 - i. Identify and train unemployed females for labour type jobs (non-traditional).

- j. Take steps to refocus the views of young people that taking a trade is a good thing:
 - i. Approach to school guidance counselors
 - ii. Promote trades as an important profession
 - iii. Make courses available at colleges
 - iv. Encourage schools to support a better mix of entrepreneurship and trades as well as the development of locally appropriate enterprises.
- 4. Infrastructure/Support Services:
 - a. Establish an electronic "bulletin board" on which various sector members can post activities on a timely basis; e.g. items wanted, upcoming events, industrial visits, etc.
 - b. Pursue broadband internet access across the region.
 - c. EC staff should visit the region's businesses on a regular and timely basis (priorities), especially during the first 6 months of implementation to assess with respect to growth and marketing potential and to determine development needs.
- 5. Clustering:
 - a. Set up a networking system whereby EC could organize a monthly get together for the manufacturing companies.
 - b. Support the continuation of the Manufacturing Sector Task Group (regular meetings).
 - c. Undertake a "clustering" study for the Central region and consider making it extra-regional (critical mass).
 - d. Explore "strategic alliances" for export market development.
 - e. Explore coop purchasing of materials and services.

iv. Knowledge Based Industries (KBI)

The employment target proposed for this sector was a net increase of 70 jobs, including Customer Contact Centres. To accomplish this end, the following actions are proposed:

- 1. Organization and Networking:
 - a. Confirm the number of companies and employment in the region.
 - b. Establish one voice for the Information and Communication Technology (ICT) industry in the region.
 - c. Identify industry representatives & ensure cross pollination.
 - d. Have EC play a facilitator/broker role to get sector group established.
 - e. Seek to provide a forum for the sector members to meet and collaborate.
 - f. Assist sector representatives to connect with what is going on in e-government.
- 2. Services & Infrastructure:
 - a. Assist the industry in expanding into new markets through innovative strategic alliances, networking and marketing activities that provide services such as project management, brokerage, consulting and marketing.
 - b. Identify the needs for advanced technology infrastructure.
 - c. Seek affordable high speed connectivity available to all areas in the region.
 - d. Maintain a close liaison with technical and business support services available in Fredericton, including Incutech (perhaps an incubation Outreach Program).
- 2. Marketing:
 - a. Inventory the resources of current companies.
 - b. Develop sector niches in the Central region.
 - c. Promote the regional ICT industry.

3. Partnerships:
 - a. Strengthen partnerships with governments and supporting agencies.
 - b. Support collaboration between ICT and traditional businesses (IT solutions).
4. Human Resource Development and Training Issues:
 - a. Have Enterprise Central coordinate its partners, agencies, educational institutions and representatives from the industry to conduct a Training Needs survey.
5. Customer Contact Centres:
 1. Inventory buildings throughout region that may be attractive to CCC businesses
 2. Ensure EC is in a position to supply labour force and other relevant data to interested CCC prospects on a timely and confidential basis.
 3. Ensure BNB is fully aware of the region's interest and capabilities in this arena

v. Tourism

The Tourism Sector Task Force has identified a number of opportunities to enhance business growth and foster job creation in the Central New Brunswick Region. Redirecting some of the traffic that bypasses Central NB via the TCH throughout the region was posed as a primary consideration. Inland waterways were identified as a common marketing feature. The clustering of services and events in local areas provides a much-needed synergy to extend the length of tourist visitation.

To achieve the results desired by the task force, the following actions are proposed:

1. Erect signage along the Trans-Canada Highway to direct tourists along scenic loops and create rest areas.
2. Create clusters within the sub-regions previously identified using the existing demand generators as anchors.
3. Develop marketable themes within each region and marketable activities within each cluster.
4. Create a functional and effective Internet presence including booking capabilities.
5. Create inspection/accreditation programs for residences.
6. Create heritage restoration programs.
7. Assess the need for alternate accommodations such as cottages and provide support to operators.
8. Improve access, service, infrastructure (including signage) and tourism activities around inland waterways.
9. Support entrepreneurs through recognition and awards programs.
10. Create or improve training of workers for the tourism industry.
11. Support the redeployment and retraining of retired workers.
12. Encourage better teamwork between the Departments of Transportation and Tourism.
13. Create and maintain an event-planning calendar (5 year time horizon) accessible to all tourist operators.
14. Improve communication between tourism organizations in the region.
15. Undertake development a Tourism Strategy for the region - to help pull things together. Any such study should consider the inclusion of neighbouring regions and "industrial tourism".

vi. Service Sector

As noted earlier, the retail/service sector has two major components that deserve attention in the overall economic development interests of the region. The first is the local retail/service requirements that can and should be addressed in the region, and the second is the important role that the City of Fredericton plays as the major urban centre to the whole area, including Central NB. A few suggested actions to strengthen this sector and thus maximize growth are the following:

1. Service-to-Business and Retail:
 - a. Retail: i. Provide counseling assistance to local businesses and entrepreneurs - on a request basis - who want to establish or expand a retail business in the region; and ii. Support efforts that encourage consumers to shop in the region.
 - b. Service-to-Business: Proactively seek to identify the service-to-business requirements of Central NB businesses in the *economic base* and, where feasible, endeavor to have these requirements supplied from within the region.
2. City of Fredericton as Regional Service Centre:
 - a. Establish a strategic planning liaison with Enterprise Fredericton, starting with the development of each other's Strategic Plans - to ensure compatibility.
 - b. Hold joint meetings of the two Boards of Directors, at least once a year (preferably at the time of adopting draft Annual Work Plans.
 - c. Support joint planning and coordination meetings between the two enterprise centers' key staff and the Partners, at least twice a year.

vii. Clustering, Networking, Strategic Alliances

1. Undertake a study of the "clustering concept" with a view to develop a strategy for the Central region, paying particular attention to the opportunity represented by the forestry and metal fabrication sectors as well as possible tie-ins with other complementary regions; e.g. Fredericton, the Miramichi and Carleton.
2. Work with priority sector groups (continue and perhaps expand Task Groups) in an organizational support/facilitation role where and when possible (regular meetings).
3. Establish an electronic "bulletin board" for each of the priority sectors (on EC website) to which sector members can post activities on a timely basis (e.g. items wanted, upcoming events, industrial visits, etc.) as a first step to electronically "networking" businesses in the region.
4. Establish an on-line database, for investment purposes, that would include such information as: available commercial real estate; Community Profiles; labour force inventory; etc.
5. Work with companies on a group (sector) basis wherever possible, and encourage and support strategic alliances and cluster development efforts, with a particular bias towards exports and exporting.
6. Sponsor workshops, seminars and training in cluster development, business "partnering" and strategic management - again with a particular bias on exports and exporting.

viii. Entrepreneur Development

Development of the Central NB region will rest first and foremost on the dynamism and involvement of the business community. It will be important to find ways to bring the business community together around common development issues and support their

development efforts. This represents a major challenge for Central NB because of the sheer geographic size of the region and the absence of a clearly identified business centre in the region. It will be important, therefore, to find ICT solutions to help build and maintain business cohesiveness and identification with the region.

Following are some program initiatives for fostering entrepreneurship development. It is intended that the principle focus of these initiatives be on youth and SME's:

1. Organization Initiatives:
 - a. Expand the Junior Achievement Programme across the region.
2. Trade Initiatives:
 - a. Conduct one-on-one trade consultation.
 - b. Conduct Export Partnering Program (E.P.P.).
 - c. Organize "How to trade" sessions.
 - d. Perform Export Readiness diagnostic and trade mentoring.
3. Business Counseling:
 - a. Develop Youth Initiatives in Central NB.
 - b. Conduct "Improving your productivity" sessions.
 - c. Provincial commercialization sessions.
 - d. Determine the Training Needs of Central NB Business Clients.
 - e. Coordinate Small Business Week activities.
 - f. Provide counseling to new and existing small and medium entrepreneurs.
 - g. Presentations to Business Groups
 - h. Deliver Profit Learn Agenda.
4. Access to Capital:
 - a. Business Development Program
 - b. BDP Non-Commercial Program
 - c. Strategic Community Investment Fund Projects
 - d. Atlantic Innovation Program Projects
 - e. Business New Brunswick (trade & technical assistance & quality assurance).
5. Recognition/Involvement:

It is often thought that business people and entrepreneurs are merely profit-driven and to some extent that is true. However, the need for success and recognition are very important motivators as well and some would argue the more important. It is for this reason that programs and opportunities must be found to recognize and celebrate business and entrepreneurship success in the region. Wherever possible, business leaders should be recognized, consulted and profiled in any regional promotion efforts. If one does not currently exist, an Awards Night in celebration of business success should be considered for the region.

Also, business people seem to flourish in an environment in which they have the opportunity to interact with one-another and to engage in projects of common interest. It will be incumbent on Enterprise Central to identify such opportunities and to help bring the region's business players together in such forums of opportunity.

ix. Leadership, Communications & Branding

1. Prepare a communications plan to accompany each Annual Work Plan. EC must be clear with respect to:
 - a. Key messages
 - b. Target audiences
 - c. Program of activities and timelines
2. EC should identify its spokespersons and ensure that they clearly understand their role and responsibilities, including the policies, programs and positions of the enterprise center, and the key messages the CEDA seeks to communicate. The Board Chairman and Executive Director should undertake periodic meetings with media representatives to ensure they understand their role and have the background required to accurately report regional development matters.
3. EC must keep open communications with the Advisory Forum and ensure members are kept current with development programs and efforts. This is an effective way to ensure the
4. EC's message is getting out to the community in a manner so as not to be misconstrued.
4. As part of its marketing plans, EC should look at the prospects of "branding" Central NB as a region, or certain sector products or offerings; for example, but in no way limited to tourism.

Conclusion

Central NB has experienced very positive growth in both population and economic performance indicators over the past decade. The challenge going forward will be to consolidate these gains and to build on them so as to sustain and, hopefully, increase future growth and development in keeping with projected goals and objectives.

The Strategic Plan presents a definitive "game plan" to help guide the region towards the accomplishment of some very specific and challenging performance targets over the next four years. Realization of these targets will not be easy. It will require a keen focus on the "end game" and the collaboration and cooperation of EC, its Partners and the region's business and community leaders in affecting the implementation of this Plan. The leadership necessary to breath life into the Plan and to keep development on its planned course must come from Enterprise Central NB – its Board of Directors and staff.

Though the focus of this Strategic Plan is on fostering the region's economic development, it is important to keep in mind that Community Economic Development does not operate in a (economic) vacuum. Social, educational, cultural, environmental, and health issues are also important and must be considered in the overall scheme of things – for *balanced development*. The analysis section of this report does identify a number of areas of social concern, especially training and education that will need attention and improvement in the interest of the overall well being of the region. This Strategy does not attempt to address these particular issues as they are outside the scope of this study.

In the interest of achieving results, it will be necessary to focus on a few key areas as proposed in the Plan. As the region moves forward to implement the strategy it will, undoubtedly face obstacles and challenges that will require renewed commitment and flexibility. When so challenged it will help to recall the words of Henry Ford: "Obstacles are those frightening things that you notice when you take your eyes off your goal."

APPENDIX A

ENTERPRISE CENTRAL NB

BOARD OF DIRECTORS & STRATEGIC PLANNING COMMITTEE

Craig Melanson – Nackawic (President)
Donald Duplisea – Fredericton Junction (Secretary Treasurer)
Murray Doherty – Chipman (1st Vice President)
Winston Gamblin–Harvey (2nd Vice President)
Mike O'Donnell – Fredericton Junction
Byron Philips – Tracy
Jason Herron – Harvey
Donald Doherty - McAdam
Raylene Johnstone – Stanley
Robert Connors - Nackawic
Maurice Harquail – Village of Gagetown
Brian Glenn - Minto

Strategic Planning Committee Members

*Craig Melanson
Donald Duplisea
Winston Gamblin
Murray Doherty*

EC WORKING GROUP

The Partners

John Flynn, EC Executive Director (Chairman)
Wayne Gunter, ACOA
Peter MacLean, TED
Lois Williams, HRDC
Rick Allain, BNB
Paul Daigle, P.K. Consulting

ENTERPRISE CENTRAL NB ADVISORY FORUM

Mr. Peter	Knight	6 Municipal Lane	Cambridge Narrows	NB	E4C 4P4
Mr. Charles	Cole	6 Municipal Lane	Cambridge Narrows	NB	E4C 4P4
Ms. Shena	Hornell	6 Municipal Lane	Cambridge Narrows	NB	E4C 4P4
Mr. Roy	Mackin	6 Municipal Lane	Cambridge Narrows	NB	E4C 4P4
Mr. Carol S.	Doherty	10 Civic Lane	Chipman	NB	E4A 2H9
Ms. Carol	Boyd	10 Civic Lane	Chipman	NB	E4A 2H9
Mr. Edward	Ferris	10 Civic Lane	Chipman	NB	E4A 2H9
Ms. Brenda	Kelly	10 Civic Lane	Chipman	NB	E4A 2H9
Ms. Mary L.	King	10 Civic Lane	Chipman	NB	E4A 2H9
Mr. Gary	Mersereau	102 Welsey Road	Fredericton Junction	NB	E5L 1W7
Mr. John	Bigger	102 Welsey Road	Fredericton Junction	NB	E5L 1W7
Mr. Mark	Mersereau	102 Welsey Road	Fredericton Junction	NB	E5L 1W7
Mr. Philip	Peterson	102 Welsey Road	Fredericton Junction	NB	E5L 1W7
Mr. James	Webb	102 Welsey Road	Fredericton Junction	NB	E5L 1W7
Mr. Allan	Corkum	68 Babbit Street	Gagetown	NB	E5M 1C8
Mr. Frank	Massoeurs	68 Babbit Street	Gagetown	NB	E5M 1C8
Mr. Donald	London	68 Babbit Street	Gagetown	NB	E5M 1C8
Mr. Ron	Samuels	68 Babbit Street	Gagetown	NB	E5M 1C8
Ms. Karen	Shackleton	68 Babbit Street	Gagetown	NB	E5M 1C8
Mr. Winston	Gamblin	58 Hanselpacker Road	Harvey	NB	E6K 1A3
Mr. Ronald	Goodine	58 Hanselpacker Road	Harvey	NB	E6K 1A3
Mr. Scott	Harrington	58 Hanselpacker Road	Harvey	NB	E6K 1A3
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Mr. Micheal	Little	146 Saunders Road	McAdam	NB	E6J 1L2

Mr. Dean	McIntyre	146 Saunders Road	McAdam	NB	E6J 1L2
Ms. Elizabeth	Plourde	146 Saunders Road	McAdam	NB	E6J 1L2
Mr. Frank	Thorburn	146 Saunders Road	McAdam	NB	E6J 1L2
Mr. Bev	Forbes	39 Howland Ridge Road	Millville	NB	E6E 1Y3
Mr. Dean	Bell	39 Howland Ridge Road	Millville	NB	E6E 1Y3
Mr. Bill	Blaney	39 Howland Ridge Road	Millville	NB	E6E 1Y3
Mr. Jeff	Mills	39 Howland Ridge Road	Millville	NB	E6E 1Y3
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Mr. Eric	Barnett	420 Pleasant Drive	Minto	NB	E4B 2T3
Mr. Dwain	Barton	420 Pleasant Drive	Minto	NB	E4B 2T3
Mr. Micheal	McTiernan	420 Pleasant Drive	Minto	NB	E4B 2T3
Mr. Derek	Wasson	420 Pleasant Drive	Minto	NB	E4B 2T3
Ms. Rose	Collette	420 Pleasant Drive	Minto	NB	E4B 2T3
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Ms. Janet	Caldwell	115 Otis Drive	Nackawic	NB	E6G 2P1
Ms. Karen	Howell	115 Otis Drive	Nackawic	NB	E6G 2P1
Mr. Ian	Kitchen	115 Otis Drive	Nackawic	NB	E6G 2P1
Mr. Jacques	Laroche	115 Otis Drive	Nackawic	NB	E6G 2P1
Ms. Rowena	Simpson	115 Otis Drive	Nackawic	NB	E6G 2P1
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Ms. Tracy	Hunter	17 Giants Glen Road	Stanley	NB	E6B 1S4
Ms. Barbara	MacDonald	17 Giants Glen Road	Stanley	NB	E6B 1S4
Mr. Ross	Walker	17 Giants Glen Road	Stanley	NB	E6G 1S4
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Ms. Lisa	McLaughlin	4435 Heritage Drive	Tracy	NB	E5L 1C1
Ms. Carmen	Nason	4435 Heritage Drive	Tracy	NB	E5L 1C1
Mr. Lowell	Thomas	4435 Heritage Drive	Tracy	NB	E5L 1C1
Ms. Patricia	Thomason	4435 Heritage Drive	Tracy	NB	E5L 1C1
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Mr. Greg	Thompson, MP	120 Milltown Blvd.	St. Stephen	NB	E3L 1G6
Mr. Andy	Scott, MP	61 Carleton Street	Fredericton	NB	E3B 3T2

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Mr. Kirk	MacDonald, MLA	Dept. Building, West Block P.O.Box 6000	Fredericton	NB	E3B 5H1
Mr. Keith	Ashfield, MLA	Dept. Building, West Block P.O. Box 6000	Fredericton	NB	E3B 5H1
Mr. Jody	Carr, MLA	Dept. Building, West Block P.O. Box 6000	Fredericton	NB	E3B 5H1
Mr. Donald	Kinney, MLA	Dept. Building, West Block P.O. Box 6000	Fredericton	NB	E3B 5H1
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Mr. Bob	Atwin, Chief	77 French Village Rd	Kingsclear First Nation	NB	E3E 1K3
Mr. Lewis	Golden	647 Whitetale Drive	Tracy	NB	E5L 1G5
Mr. Fraser	Ingraham	P.O. Box 1163	Nackawic	NB	E6G 2N1
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Mr. Robert	Bowles	1910 Route 3	Harvey Station	NB	E6K 2P4
Mr. Norm	Shott	1910 Route 3	Harvey Station	NB	E6K 2P4
Mr. Gordon	Roach	1910 Route 3	Harvey Station	NB	E6K 2P4
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Mr	Colleen	Craig	Solena Maritime	McAdam	NB	E6J 1K6
s.			Ltd. 64 North Lane			
	Craig	Keller	BPB Westroc Inc.	McAdam	NB	E6J 1B1
Mr.			57 Quality Way			
Mr.	John	Toulman	Bank of Nova	Minto	NB	E4B 3N9
			Scotia, 11 King St.			
Mr.	Shawn	Gallagher	196 Main St.	Minto	NB	E4B 3N9
Mr.	Danny	Sparkes	156 Route 625	Cross	NB	E6B 2G8
				Creek		
Mr.	Ted	Samuels	12 Alpha St.	Napadogan	NB	E6B 1Y6
Mr.	Maartin	Vanoord	1450 Route 1615	Springfield	NB	E6E 1T9
				York		
				County		
Mr.	David	Hartt	435 Whitetail Drive	Tracy	NB	E5L 1E5
Mr.	Malcolm	MacPherson	201B Sunbury	Fredericton	NB	E5L 1R7
			Drive	Junction		
Mr.	Matt	Harris	130 Wilsey Road	Fredericton	NB	E5L 1W9
				Junction		
Mr.	Gerry	O'Leary	153 Sunbury Drive	Fredericton	NB	E5L 1R3
				Junction		
Mr.	Jamie	Alexander	5431 Route 101	Central	NB	
				Blissville		

SECTOR TASK GROUPS

Manufacturing

Sector Chair – Murray Doherty Scribe – Bonnie Beaunoyer
 Stephen Richardson - TRACC 327-4355
 Peter Morrison (Retired) General Foods, Bristol Myers 363-4307
 Paul Gaddess – Minto Machine & Welding 327-3361
 Duane Chase – KG Chase & Son Ltd. 339-5225
 Lewis Golden- APEX 368-2732
 Danny McIntyre – Granite Industries 784-2211
 Alan Wilson – Manufacturing 367-274
 David Hartt - DW Enterprises Tracey

Agriculture

Sector Chair – Brian Glenn Scribe – Bonnie Beaunoyer
 Jimmy Bridges-Bridges Farm Ltd 357-2580
 Fraser Ingraham-Ingraham Farms Dumfries NB 575-8101
 Dana or Joanne Chase's Farm – 339-5806
 Mike McNeil- Agriculture/Aquaculture – 368-7796
 Mike Jardine – Gaspereau Farms/blueberry farm – 847-7800
 Patsy Copp – St Croix Mushrooms 784-2924
 Brian Wilson – North Tay Farms Ltd 367-2745
 Scott Young – Thomas Young Ltd, Ripples

Forestry

Sector Chair – Don Doherty Scribe – Glen Vye
 Mr. Don White –President of St Anne Industries 575-3262
 Mr. Fred Summerville – Forest Operations –work 575-3200 home 363-3401
 Mr. Peter Tabor – Grand Lake Timber –JD Irving 339-7900
 Pierre Belanger – Chipman Saw Mill Ltd. 339-1011
 Jamie Alexander – Forestry – 368-7826
 William Gillespie – 366-3113
 Danny Sparkes – 367-2263
 Robert Connors – Mayor, Nackawic 575-2241
 Ken Hardie – NB Federation of Woodlot Owners –459-2990

Tourism

Sector Chair – Raylene Johnstone Scribe- Glen Vye
 Doreen Morrel – Salmon River Lodge 339-8097
 Janet Caldwell – co-owner Country Gift Shop 575-8487
 Lee Sochasky – 466-7551
 Sheelah Wagener – 458-5646
 Alida Visbach – 363-4999 Kings Landing General Manager
 Ann Scovil – 470-7505 Ann Scovil Architect
 Leonne Pippard – 488- 2020 General Manager River Society
 Brian Johnson – 444-9500 Kingswood Park
 Robert Kitchen – 575-9622 Mactaquac Country Chamber of Commerce

Employers/Employment in the Economic Base - 2001

NAICS	Sector	# of ERs	Min. # of Employees	Max. # of Employees	% Growth
11	Agriculture, Forestry, Fishing and Hunting				
1112	Vegetable and Melon Farming	11	53	182	
1113	Fruit and Tree Nut Farming	12	65	132	
1114	Greenhouse, Nursery & Floriculture Production	6	10	10	
1121	Cattle Ranching & Farming	15	36	55	
1123	Poultry & Egg Production	4	194	196	
1133	Logging	17	1063	1217	
31-33	Manufacturing				
311	Food Manufacturing	6	19	24	
312	Beverage & Tobacco Product Manufacturing	2	8	14	
313	Textile Mills	1	8	22	
314	Textile Product Mills	4	11	13	
315	Clothing Manufacturing	2	14	18	
321	Wood Manufacturing	14	424	453	
323	Printing & Related Support Activities	5	21	31	
324	Petroleum & Coal Product Manufacturing	2	7	93	
325	Chemical Manufacturing	3	31	32	
326	Plastics & Rubber Product Manufacturing	6	124	146	
327	Non-Metallic Mineral Product Manufacturing	8	15	20	
332	Fabricated Metal Product Manufacturing	13	134	224	
333	Machinery Manufacturing	2	54	55	
334	Computer & Electronic Product Manufacturing	1	3	3	
336	Transportation Equipment Manufacturing	7	28	41	
337	Furniture & Related Product Manufacturing	9	127	163	
339	Miscellaneous Manufacturing	8	110	257	
51	Information & Cultural Industries				
5121	Motion Picture & Video Industries	2	4	6	
54	Professional, Scientific and Technical Services				
5413	Architectural, Engineering & Related Services	4	7	12	
5414	Specialized Design Services	2	2	3	
5415	Computer Systems Design & Related Services	2	2	3	
5416	Management, Scientific & Technical Consulting Services	6	11	23	
5419	Other Professional, Scientific & Technical Services	2	3	3	
56	Administrative and Support, Waste Management and Remediation Services				
5619	Other Support Services	2	5	14	
71	Arts, Entertainment & Recreation				
7121	Heritage Institutions	2	117	330	
7139	Other Amusement & Recreation Industries	1	100	100	
72	Accommodation & Food Services				
7211	Traveler Accommodation	10	75	99	
	TOTAL	191	2885	3994	

Employers/Employment in the Economic Base - 2001

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336	Transportation Equipment Manufacturing	7	28	41	
337	Furniture & Related Product Manufacturing	9	127	163	
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51	Information & Cultural Industries				
5121	Motion Picture & Video Industries	2	4	6	
54	Professional, Scientific and Technical Services				
5413	Architectural, Engineering & Related Services	4	7	12	
5414	Specialized Design Services	2	2	3	
5415	Computer Systems Design & Related Services	2	2	3	
5416	Management, Scientific & Technical Consulting Services	6	11	23	
5419	Other Professional, Scientific & Technical Services	2	3	3	
56	Administrative and Support, Waste Management and Remediation Services				
5619	Other Support Services	2	5	14	
71	Arts, Entertainment & Recreation				
7121	Heritage Institutions	2	117	330	
7139	Other Amusement & Recreation Industries	1	100	100	
72	Accommodation & Food Services				
7211	Traveler Accommodation	10	75	99	
	TOTAL	191	2885	3994	